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## City Council Regular Meeting

**DEPARTMENT:** Customer Service  
**FROM:** Jesse Elizondo, Director of Customer Service  
**MEETING:** September 6, 2022

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**SUBJECT:**

Consider approval of a contract with Incapsulate Salesforce Solutions for a customer relationship management software supporting the city's 311 system in the amount of \$766,491.60 over five years. (Staff Contact: Jesse Elizondo, Director of Customer Service)

**SUMMARY:**

The City of Burleson is committed to being innovative and intentional in making customer service a priority for citizens, stakeholders and city administration. With calls for service and requests for dynamic information increasing daily, coordination across multiple departments throughout the city is essential to deliver exceptional services to citizens and keep all staff informed. The proposed customer relationship management (CRM) software will serve as a comprehensive system supporting the city's new 311 call center. This system will enable citizens, stakeholders and staff to submit and track service requests, respond to issues, answer cross-departmental inquiries and measure/track related performance metrics across the organization. This software is crucial to 311's mission to provide the highest and most efficient customer experience to our citizens and to provide the most effective internal processes through data driven analysis.

On April 22, 2022, the city issued a Request for Proposal (RFP) for a customer relationship management solution and received twelve submissions. An evaluation team scored those submissions based on vendor qualifications, applications, functionality, price, implementation methodology, support and training. In June 2022, the top three proposals presented their full demonstrations. Ultimately, the evaluation team selected Incapsulate Salesforce Solutions as the top proposal. After completing contract negotiations and fully reviewing scope of work, the final contract in the amount of \$766,491.60 over five years is before council on September 6, 2022 with the yearly breakdown as follows:

Year 1: \$362,061 (all software, licenses, implementation, training and support)

Year 2: \$ 98,605 (ongoing maintenance, licenses, training and support)

Year 3: \$100,235 (ongoing maintenance, licenses, training and support)

Year 4: \$101,922 (ongoing maintenance, licenses, training and support)

Year 5: \$103,669 (ongoing maintenance, licenses, training and support)

\* 3.5% escalation build in year over year

The CRM software will integrate (to the fullest extent possible) with existing work order systems within the city as well as the city's GIS mapping system. These integrations will allow staff the

ability to model, measure, and map dynamic requests and information across all departments to provide a next level customer experience for citizens and data driven decisions for the city. The CRM software will also allow customers to engage with 311 in multiple ways including voice call, email, text, web portal, mobile app and more. Not only will this enhance citizen engagement through responsiveness and ease of use, but also allows citizens to search, track, share and receive real-time updates on all service requests and dynamic information. Administratively, the CRM software captures extensive data and mapping, providing tremendous opportunity for internal reporting, efficiency metrics, resource management, service tracking, cost savings and data driven decision-making. The CRM system as the backbone of Burleson's 311 division will streamline information and service request intake, enhance citizen engagement, increase efficiency in service, improve resource allocation and provide the citizens of Burleson a next level customer experience when interacting with their municipal government.

### **PRIOR ACTION/DISCUSSION**

- *January 18, 2022* presentation to city council regarding the newly created customer service department including the future vision and goal of the city's 311 division and use of customer relationship management (CRM) software.
- *April 18, 2022* presentation to city council on the results of the 2022 citywide citizen satisfaction survey with the city's 311 division/CRM system referenced as a way to elevate customer service throughout the organization.
- *June 20, 2022* customer relationship management software discussed during an operational overview of the proposed FY22-23 information technology department budget.
- *July 5, 2022* detailed discussion of the city's 311 division/CRM system structure and functionality during an operational overview of the proposed FY22-23 customer service department budget.
- *August 4, 2022* overview and discussion of the city's 311 division/CRM system during the city manager's FY22-23 budget presentation.

### **OPTIONS:**

- 1) Approve the contract with Incapsulate Salesforce Solutions
- 2) Deny the contract

### **RECOMMENDATION:**

Staff recommendations approval of the contract with Incapsulate Salesforce Solutions.

### **FISCAL IMPACT:**

This item has been budgeted and will utilize both the General Fund (61%) and Support Services Fund (39%).

The total project cost will be \$766,491.60 over five years.

**STAFF CONTACT:**

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